

Creating a Budget Exercise

Follow the directions below to create a budget using Excel. Read through each individual direction before performing it, like you are following recipe instructions.

Remember that text is entered (typed in) or pasted wherever the *black box* is positioned. Always make sure the *black box* is on the cell you want text to be entered. To move the location of the *black box*, move the mouse pointer and click. When using Excel, to move between different cells, you can use the arrow keys (up, down, left, right) or you can use the *Tab* key to move across and the *Enter* key to move down.

Remember, too, that there is usually more than one way to do something. If a different way to do it occurs to you, go ahead and try it! If it doesn't work, you can always click on the **Undo** button on the *Quick Access Toolbar*. If you can't remember what a command does, move the mouse pointer over it and pause. A *ToolTip* appears describing the button's function.

In the instructions, the following terms will be used:

Click- a single left mouse click.

Command- a button displayed on a tab on the Ribbon.

Key – on the keyboard.

Drag Cursor – a black line with black arrows on both sides

Select Cursor – a black arrow pointing down or across

Part One: Enter Information

1. Type **Personal Budget 2013** in A1. Press 'Enter' twice.
2. Type **Income** in A3, press tab once
3. Type **Jan** in B3. Use the copy cursor to drag across and fill in the months all the way to Dec. Click in the Dec cell and press tab once. Type the word **Year**.

4. Type **Salary** in A4. Press Enter once
5. Type **Income Totals** in A5. Press Enter twice
6. Type **Expenses** in A7. Press Enter Once
7. Type **Mortgage/Rent** in A8. Press Enter Once
8. Type **Utilities** in A9. Press Enter Once
9. Type **Cell Phone** in A10. Press Enter Once
10. Type **Groceries** in A11. Press Enter Once
11. Type **Gas** in A12. Press Enter Once
12. Type **Entertainment** in A13. Press Enter Once
13. Type **Savings** in A14. Press Enter Once
14. Type **Expense Totals** in A15. Press Enter Once
15. Type **Overall Total** in A16.
16. Click in cell B4 and type **3000**. Use the copy cursor to drag across and copy that number all the way through Dec
17. Click in cell B8 and type **600**. Use the copy cursor to drag across and copy that number all the way through Dec
18. Click in cell B9 and type **200**. Use the copy cursor to drag across and copy that number all the way through Dec
19. Click in cell B10 and type **60**. Use the copy cursor to drag across and copy that number all the way through Dec
20. Click in cell B11 and type **150**. Use the copy cursor to drag across and copy that number all the way through Dec
21. Click in cell B12 and type **100**. Use the copy cursor to drag across and copy that number all the way through Dec
22. Click in cell B13 and type **60**. Use the copy cursor to drag across and copy that number all the way through Dec

23. Click in cell *B14* and type **500**. Use the copy cursor to drag across and copy that number all the way through Dec.

Part Two: Formatting the Information

1. Click on *A1* '*Personal Budget*' cell and drag your cursor over to highlight that row through the end of '*Year*'. Look in the *Alignment* group and click on the small arrow next to **Merge & Center** to give a drop down menu. Select **Merge Across**.
2. Move your cursor up to *Column A* and place it on the line to the right, the cursor should turn into the drag cursor. Double click on the line
3. Center the Months by clicking on the cell containing '*Jan*' and dragging across to '*Year*'. Click the **Center** command in the *Alignment* group.
4. Click on the '*Personal Budget*' cell and select **Cell Styles** in the *Styles* group. (This may be an arrow to the right of the expanded styles under the small scrollbar)



Select **Accent 5**.

5. Click on the '*Income*' cell and drag across to highlight that entire row. Select Cell Styles and click **Accent 3**.
6. Click on the '*Expenses*' cell and drag across to highlight that entire row. Select Cell Styles and click **Accent 4**.
7. Select the '*Overall Total*' cell and drag across to highlight that entire row. Select Cell Styles and click **Accent 6**
8. Change the font size of '*Income*', '*Expenses*', and '*Overall Total*' to **14** by clicking in each cell and using the font size command.
9. Change the font size of '*Personal Budget*' to **18**

Part Three: Inserting Formulas

There are two ways to insert automatic calculation formulas. You can use the Autosum button in the Editing Group or you can type it in yourself. Let's try both.

1. Click in cell *B5* and drag across to highlight that entire row. In the *Editing* group, click on the arrow next to the **Autosum** command and choose **Sum**.
2. Now click in cell *N4*. Type **=sum(B4:M4)** and press Enter. Your totals are calculated for income.
3. Click in cell *B15* and drag across to highlight that entire row. In the *Editing* group, click on the arrow next to the **Autosum** command and choose **Sum**.
4. Click on cell *B8* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
5. Click on cell *B9* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
6. Click on cell *B10* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
7. Click on cell *B11* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
8. Click on cell *B12* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
9. Click on cell *B13* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
10. Click on cell *B14* and drag across to highlight that entire row all the way through *Year*. Click the **Autosum** command.
11. You now have the totals for your expenses.
12. To calculate the difference between your total income and total expenses, click on cell *N16* and type **=N5-N15** then press Enter

13. To add lines to your budget, click and drag over the whole budget to highlight it, then click the arrow next to the **Borders** command in the *Font* group and choose **All Borders**

Part Four: Printing the List

Sometimes Excel sheets can be tricky when printing in terms of fitting everything on one page. If you have more than 5 columns (which we do in this exercise) it's likely that when printing, the last 1 or more will be pushed onto a second page. There are two ways of adjusting this.

1. To see how your page is going to print click on the page layout view button in the status bar at the bottom of your worksheet. This will split the page and show that part of your budget is going to be on a second page.
2. Click on the *Page Layout* tab at the top of the page and click on **Orientation** in the *Page Setup* group. Change it to **Landscape**.
3. Now adjust the width by changing it in the *Scale to Fit* group. Right now Width and Height are set to automatic. Click on *Width* and change it to **1 page**.
4. **Note:** When you are in the page layout view you can title your worksheet by typing in a name such as Address List or Expense Report, etc. where it says "Click to Add Header".
5. Change the view back to Normal by clicking on the normal view button in the status bar at the bottom of your worksheet.
6. Now you can input numbers and the budget will automatically calculate the correct sums. Try this by changing some of the numbers in the expenses group.

Part Five: Saving the List

1. Click on the *File Tab* and click on Save As from the menu.
2. When the *Save As* dialog box opens, check under **Computer** in the *Folders pane* to verify that your table is saving to your thumb drive.

3. At the bottom of the dialog box, click in the *File name:* area and type a new name for your budget. You may have to erase the name that is in there first.
4. Click on the *Save* button.

Completed Exercise

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